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Sectoral Brief

Tourism

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Building a nature positive economy: The role of policy and business

Nature is the foundation of our economies, societies, and well-being—yet we are depleting it at an alarming rate through land and sea use change, resource overexploitation, human-induced climate change, and pollution.[1] With more than half of global GDP dependent on nature and its services,[2] biodiversity loss and environmental degradation are not just an ecological crisis. They pose significant risks to businesses, supply chains, and financial markets worldwide. To address this challenge, policy frameworks are evolving to make nature an integral part of economic and financial decision-making. These policies can create an enabling environment for businesses to align their operations with nature-positive principles and support a wider transition to a nature-positive economy.

What is 'nature positive'?[3]

Nature positive is a global goal aimed at halting and reversing nature loss by 2030 and achieving full recovery of nature by 2050. It represents a shift from merely minimising environmental harm to actively protecting, restoring and using nature in a sustainable way to improve the health, abundance, diversity, and resilience of species, ecosystems, and natural processes.[4] Operationalising this concept involves (i) reducing negative impacts on nature and addressing drivers of nature degradation; (ii) increasing positive impacts, including through nature-based enterprises, nature-based solutions (NbS), and conservation measures; and (iii) fostering transformative change to our economy and society. Companies that integrate nature into their decision-making can enhance long-term resilience, unlock new markets, and reduce material financial risks tied to biodiversity loss.[5]

What is a nature-positive economy?

A nature-positive economy (NPE) means that the net result of all economic activities combined leads to an absolute increase in nature towards full recovery.[6] This will require businesses, governments, and citizens to act across multiple scales in every sector, while aligning with social-ecological well-being and equity. By embedding nature-positive strategies into policy design and core business operations—whether through supply chain transformation, regenerative business models, or investment in nature-based solutions—progress can be made towards a thriving, sustainable economy.

How to transition?

The transition to a nature-positive economy demands action from all parts of society, from public policy to private initiatives. In this series of briefs, we explore how five critical sectors – agriculture, the blue economy, forestry, green buildings, and tourism - can take nature positive actions to support the transition to a nature-positive economy. Each brief highlights the sector's current impact on nature and looks at how the EU policy framework and international private initiatives can potentially support or hinder the sector's NPE transition. We also highlight existing examples of businesses in the sector taking nature positive actions. This brief focuses on the tourism sector.

Tourism at a crossroads: Challenges and opportunities in the nature-positive economy

Tourism is a key pillar of Europe's economy and cultural identity and has significant impacts on ecosystems, the climate and local livelihoods. The industry is highly diverse, encompassing interconnected value chains which contribute around 10% of the EU's GDP and employ around 8% of its workforce - nearly 23 million people.[7] With an estimated 80% of the value of travel and tourism goods and services dependent on nature,[8] industry competitiveness relies on resilient nature, attractive landscapes and the ability to meet customer demands for increased sustainability.[9] At the same time, climate change is posing significant risks to many destinations and the sector's environmental footprint continues to degrade the same ecosystems that attract visitors. Yet tourism's cross-cutting nature offers opportunities for mitigation and resilience building. Eco-, nature- and regenerative tourism models are emerging as alternatives to conventional mass tourism, focusing on reducing environmental impacts, conserving natural and cultural heritage, and sustainably strengthening local economies for long-term viability.

Tourism's environmental toll: Balancing growth and conservation

Although healthy ecosystems are vital to the tourism industry, unsustainable practices remain a major driver of environmental degradation in Europe. Key impacts include biodiversity loss and habitat degradation, as uncontrolled infrastructure development for tourist accommodations and facilities as well as excessive foot traffic in natural areas contribute to soil erosion, vegetation loss, and wildlife disturbances. Mass tourism has also led to deforestation, coastal erosion, and freshwater depletion in popular destinations.

Additionally, tourism significantly contributes to pollution and resource depletion through transportation emissions, waste generation, and excessive water use. Overcrowding further strains fragile ecosystems and puts pressure on biodiversity, depletes local resources, and diminishes residents' quality of life.[10] Many European destinations face exacerbating tensions between tourism growth and community well-being, not least through increasing living costs, inadequate infrastructure, and deepening socio-economic disparities.[11]

A path forward: Transitioning to sustainable and regenerative tourism

As both a beneficiary of biodiversity and a sector vulnerable to its decline, tourism has a strong vested interest in preserving resilient nature and becoming resilient, sustainable, and regenerative. From an economic perspective, embracing nature-positive strategies that prioritise conservation, community well-being and ecological balance presents significant potential for tourism-driven value creation and supporting regional development through income and job opportunities. Regenerative and eco-tourism can also generate revenue for biodiversity protection while culturally and financially empowering indigenous and local communities. Investments in sustainable infrastructure, low-carbon transportation, and smart destination management are essential for mitigating the negative effects of mass tourism.[12] Scaling up these practices can enhance the sector's long-term viability but requires careful planning and management that could conflict with commercial tourism development pressures.[13]

EU policy: Enabling or hindering the nature-positive transition?

A strong policy framework is essential to drive the tourism sector's transition to a NPE. Policy can assist by setting clear targets and establishing a vision, discincentivising and fading out harmful practices, and providing financial incentives for sustainable tourism. Public policies, including strategies, regulations, and funding instruments, can either accelerate this transition by promoting sustainable practices and biodiversity conservation or hinder progress if they continue to support environmentally harmful practices. In an accompanying report,[14] we evaluate more than 60 global and EU policies to identify potential support or hindrances regarding the NPE transition. Here we use examples of key EU tourism sector policies to explore these potential impacts in more detail.[15]

Global and cross-cutting EU policies

At the global level, an overarching framework is provided by policies such as the **Kunming-Montreal Global Biodiversity Framework (GBF)** and the **Paris Agreement**, which broadly support the "nature positive" agenda, aiming to halt and reverse biodiversity loss while addressing climate change. While the GBF includes targets to ensure that all sectors are managed sustainably and ensure the full integration of biodiversity (Target 14) as well as provides a roadmap for integrating biodiversity conservation into global economic systems and encourages governments, businesses, and communities to take coordinated action, tourism is not explicitly targeted.

Similarly, the Paris Agreement establishes a global warming target and aims to enhance adaptive capacities, strengthen resilience, and reduce climate change vulnerability, while not explicitly targeting tourism.

EU policy can support NPE by establishing a vision and direction, such as through the **European Green Deal (EGD)**, the EU's flagship strategy for achieving the transition to a climate-neutral economy by 2050. Launched in 2019, it provides a comprehensive policy framework for transforming the EU's economy to reduce greenhouse gas emissions, enhance resource efficiency, and restore Europe's natural ecosystems. Among other important policies, the EGD includes the **EU Biodiversity Strategy for 2030**, which aims to halt biodiversity loss, restore degraded ecosystems, and enhance green infrastructure. It establishes targets and underscores the need for transformative changes across sectors to integrate biodiversity into every aspect of policymaking and business practices, ensuring long-term resilience.

The evolving EU political landscape following the 2024 elections—with a focus on competitiveness and policy simplification—introduces potential risks. Recent initiatives such as the European **Competitiveness Compass** and the **Omnibus simplification package** illustrate this shift. While efforts to reduce administrative burdens can be beneficial, care must be taken to ensure they do not undermine ambitious and mandatory nature policies.

EU policy can also *establish rules and regulations* that reduce a sector's negative impacts on nature and create additional nature, an approach employed by the **EU Nature Restoration Regulation**. This regulation introduces legally-binding and time-bound targets to restore degraded ecosystems, habitats and species in the EU. Through these targets and an obligation to draft National Restoration Plans, the EU Nature Restoration Regulation is expected to boost national restoration efforts, bringing the EU closer to the nature-positive economy.

Finally, EU policies can *provide funding for nature-positive or nature-negative activities*. The **Multiannual Financial Framework (MFF)**, for example, establishes the EU's long-term budget, outlining priorities and ensuring predictable and stable funding for various policies and programs. While funding through the current MFF (2021-2027) supports some nature-positive initiatives such as responsible resource use and green and blue infrastructure development, it can also fund activities that may conflict with the NPE, such as infrastructure expansion and environmentally harmful agricultural production. These conflicting priorities within the EU budget weaken its transformative potential for a nature-positive transition.

Sector-specific policy in the EU

Sector-specific EU policy can also support the NPE transition. Green transition policies and funding can encourage businesses to implement sustainable operations, with financial incentives supporting green certifications, circular economy initiatives, and carbon neutrality goals. Following the adoption of a new industrial strategy in 2020 to help EU industry lead the green and digital transition, the European Commission outlined a Transition Pathway for Tourism in early 2022 to achieve long-term resilience in the sector. The Council of the European Union (2022) reinforced the call for resilience and sustainability when shaping the European Agenda for Tourism 2030, published in December 2022.[16]

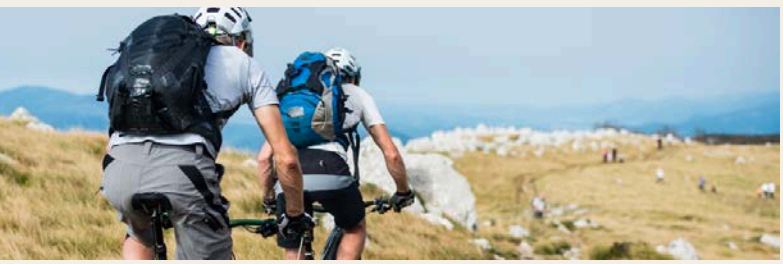
The European Agenda for Tourism 2030 sets ambitious objectives for sustainable tourism, focusing on the green and digital transition, resilience, and inclusion. It promotes circular economy practices, decarbonisation of transport, green public procurement, and public-private partnerships, while encouraging sustainability in tourism management. The agenda supports a NPE by aligning biodiversity and climate neutrality goals and promoting eco-friendly practices, such as circular economy models and third-party verified sustainability certifications. It also highlights the need to adapt to climate change, preserve biodiversity, and safeguard local cultural heritage. However, it remains a non-binding policy relying on voluntary compliance, leading to potential inconsistencies across EU member states. Weak regulatory enforcement and the lack of binding measures create gaps in accountability, limiting the agenda's potential to fully support the NPE transition.

Private sector leadership in tourism's nature-positive transition

Alongside public policy, private and non governmental actors play a critical role in driving the transition to a nature-positive economy. Key initiatives include, for example, sustainability reporting (such as the Taskforce on Nature-related Financial Disclosures[17]), finance alignment (such as the Finance for Biodiversity Foundation), and knowledge development (such as IPBES[18]). In the tourism sector, some businesses are already collaborating to promote sustainable tourism practices. The following initiatives stand out for their impact on the NPE transition:

Global Sustainable Tourism Council (GSTC)[19]

Established in 2007, the GSTC is a non-profit organisation that develops global standards for sustainable tourism. It acts as an umbrella organisation, bringing together private industry (e.g., cruise and hotel companies), government agencies, and NGOs. In addition to knowledge sharing, capacity building, and some policy advocacy work, its primary instrument supporting the NPE transition is the GSTC Criteria, a set of standards that aim to shift business operations focusing on environmental sustainability, social responsibility, cultural heritage, and sustainable management. These standards were drafted to align with the UN SDGs and are broadly aligned with the NPE transition. The ability for GSTC to have on-the-ground impact depends on voluntary implementation of these standards by tourism actors.



World Travel & Tourism Council (WTTC)[20]

Established in 1990, the WTTC is a non-profit organisation representing the private travel and tourism sector. It gathers more than 200 large companies, who collectively represent 30% of the sector's total turnover. While it promotes some sustainable tourism practices, its primary focus remains on the potentially conflicting objective of overall sectoral growth. Examples of areas where WTTC's overlaps with NPE include the development of voluntary programmes, such as criteria/guidance for hotel sustainability; data gathering and research, including a report, toolbox, and vision focused on nature-positive travel and tourism; and policy advocacy, including a Net Zero Roadmap for the sector, support for sustainable aviation fuels, and reduced single-use plastics. Also, in line with NPE transition, the WTTC has consulted with broader stakeholders, for example as part of its *Nature Positive Travel and Tourism report*,[21] and developed guidance related to Indigenous tourism. However, the guidance and standard setting are all voluntary, with no specific requirements for WTTC members to implement.

Scaling change: Examples of nature-positive tourism policy in practice

Valsugana Lagorai, located in northeastern Italy, is managed by a Destination Management Organization (DMO) that was established by representatives from the public sector, private enterprises, and civil society. The region encompasses 24 municipalities with a total population of approximately 62,000 residents. Demonstrating a strong commitment to environmental sustainability, Valsugana boasts an average recycling rate of 70%, reaching over 80% in larger municipalities, and generates more hydroelectric energy than its local consumption requires.

In 2019, Valsugana became the first Italian destination to achieve certification from the Global Sustainable Tourism Council (GSTC) 22 , reflecting its dedication to sustainable tourism practices. This certification process involved addressing various environmental challenges and contributing to nature restoration efforts. Supported by the DMO, several accommodation facilities also obtained GSTC certification, thereby reducing the environmental impact across the tourism value chain.

The DMO played a pivotal role in a significant reforestation project at Arte Sella, an open-air museum in Borgo Valsugana. Following the devastation caused by the Vaia storm in 2018, the DMO collaborated with public and private organisations, as well as local citizens and visitors, to restore the affected areas. This initiative aimed to preserve the unique integration of art and nature that characterises Arte Sella.

Valsugana Lagorai DMO actions are aligned with the Transition Pathway for Tourism in particular in relation to Topic 6 on sustainable mobility: Promoting eco-friendly transportation options to reduce carbon emissions; Topic 7 on circularity of tourism services: Implementing practices that minimise waste and encourage resource recycling; Topic 8 on green transition of tourism companies and SMEs: Supporting local businesses in adopting sustainable operations. Despite these positive contributions towards mitigating the negative impacts of tourism, current action often offers limited references to nature restoration.

Final reflections

Healthy ecosystems are essential to achieve the EU's political priorities, including its competitiveness. They provide important services that form the backbone of many economic sectors, including agriculture, the blue economy, forestry, the built environment, and tourism. Such services—ranging from carbon sequestration and water purification to soil fertility and pollination—are integral to maintaining Europe's economic stability and growth. As global markets increasingly prioritise sustainability, **investing in nature-positive solutions and nature-based enterprises enhances Europe's ability to compete in emerging green markets,** ensuring sustainable growth and securing its leadership in the global transition to a nature-positive economy. By embedding nature-positive strategies into policy design and business operations, progress towards the transition to NPE can be achieved.

To support a nature-positive transition in tourism, EU policy frameworks must move beyond voluntary initiatives towards binding targets, robust accountability mechanisms, and dedicated financial instruments. At the same time, support for increased local uptake of recognized sustainability schemes, such as the EU Ecolabel and the EU Eco-Management and Audit Scheme, can be promoted to further align business operations with long-term conservation goals. Scaling up their use alongside green public procurement and clearer environmental safeguards such as zoning regulations, impact assessments, and enforceable ecological thresholds can mitigate biodiversity loss and resource overuse in ecologically sensitive tourism destinations.

Tourism policy should therefore prioritise investment in low-impact, climate-resilient infrastructure, inclusive destination management, and green business models—supported by data and collaborative planning approaches. Additionally, incentives and planning frameworks have the potential to actively promote eco- and regenerative tourism models, including Indigenous tourism, to not only support conservation and cultural preservation, but also create meaningful economic opportunities in remote areas.

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[3] Definitions and key terms are drawn from the GoNaturePositive Concept Note; see it for a more detailed introduction to concepts discussed in this brief: GoNP! Concept Note 15/10/24

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[19] Four other sectoral briefs focus on other sectors and their policies and initiatives. Available at https://www.gonaturepositive.eu/.

[20] This section summarises the broader policy instrument selection and analysis conducted in the full source report. For methodological details and the complete list of analysed instruments, see GNP! Deliverable 1.3.

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